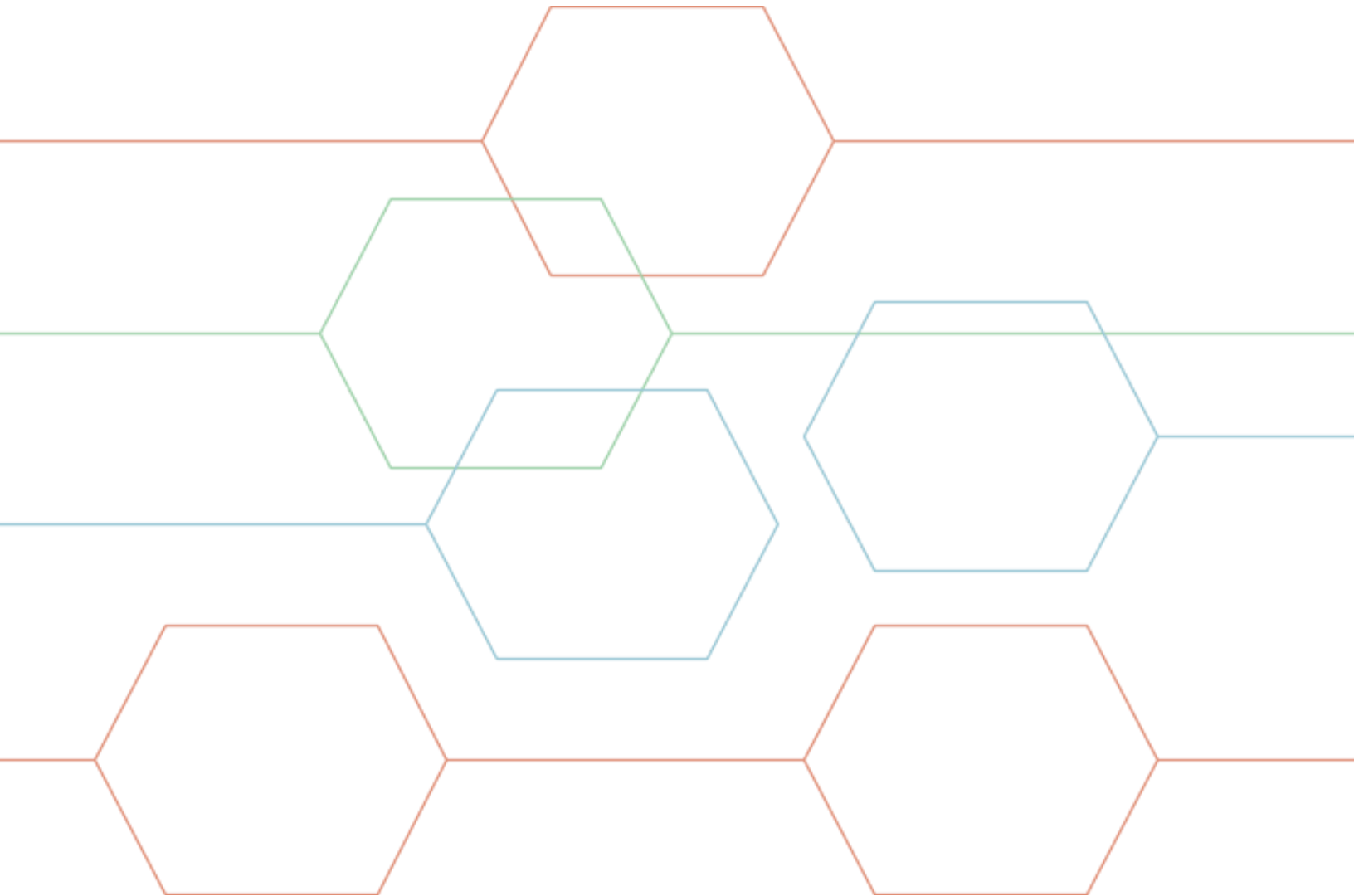The Library Board of Trustees of the Fairfax County Public Library

Community Engagement
Findings and Recommendations

CIVICTechnologies

In association with The Ivy Group
Revised September 9, 2016

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2.0 Executive Summary

2.1 Introduction

CIVICTechnologies, in association with The Ivy Group, was retained to undertake a community engagement project to identify future library services in Fairfax County. The project was under the direction of the Library Board of Trustees. The Library Board's Planning Committee undertook direct oversight and project management.

2.2 Public Input

Several means were utilized to obtain public input including:

- Access Service User Interviews
- Advocate Interviews
- Confidential Emails
- Focus Groups
- Library Managers Market Segmentation Workshop
- Library Staff Interviews
- Library Staff Project Orientation Meetings
- Library Website Page for the Engagement Project
- Market Segmentation Customer and Usage Analysis
- Online Survey of Community Residents
- Online Survey of Library Trustees and Staff
- Public Forums
- Stakeholder Interviews
- Telephone Survey of Community Residents

The telephone survey was the only statistically independent measure of public input across the entire county. The telephone survey interviewed 1,109 people, 809 on land lines and 300 on cell phones. The telephone survey has a 95% confidence interval and with a +/-3% margin of error for the estimated 1,012,409 resident of Fairfax County who are 18+ years old. Sixteen percent of respondents were of Hispanic ethnicity, reflecting the demography for Fairfax as a whole. The Ivy Group tabulated the results. In addition to the quantitative elements of the survey, an open end question captured 516 responses which are presented verbatim in 19 topic categories.

The market segmentation customer and usage analysis also presents independent empirical data. The online public survey participation was extraordinarily high with over 18,000

respondents. This survey, however, is not a statistically valid method and is heavily weighted to existing library users.

Some of the top level findings from the telephone survey include the following:

- Respondents believe that children, individuals with special needs, and older adults are FCPL's top service priorities. Among the eight audiences rated, business owners and job seekers rank the least important.

- Resources and services deemed most important for the Library to expand or enhance are children's programs, books and materials; reference materials and services; adult literacy programs; and services for English language learners.

- While 82% of library users report that they are extremely satisfied with the Library overall only 63% report that FCPL does all it can to offer services and resources that residents need, and only 78% report that the library provides good value for the tax dollars invested. These differences reveal that while users are mostly satisfied with what they're getting from the library, they believe that the library can do significantly better and deliver significantly more value.

- Library users report that they are most satisfied with staff courtesy and customer service provision, self-checkout stations, and parking.

- When asked about potential new service offerings, respondents express the greatest interest in off-site book drop/pick up, more self-service options, laptops or tablets available on loan, and live chat with a member of library staff.

- The primary reasons that non-users indicate for not using the Library are that they use the Internet to get information (28%); do not have the time to use the Library (20%), or have other places to get reading materials (10%).

- Forty-nine percent of library users indicate that they have used the Library more than 12 times in the past year. Of those users, 58% are considered "power patrons", having used FCPL more than 25 times in the past year.

2.3 Summary of Emerging Themes

The following major themes emerged from research and observations and are the basis for recommendations below.

- The organizational health of the library, the Library Board, and the Friends groups needs to improve.

- The library needs a vision about its role in the community.

- The library is torn between fulfilling a traditional service model and an evolving service model. The vocal advocates support the traditional service model. The

voices supporting an evolving service model to meet changing societal conditions need to be heard, too.

- Across a range of eight statements about the work of the Library Board, survey results indicate that the Library Trustees see greater success than does staff.

- Survey results indicate that library staff and the community are out of sync on library service priorities.

- Stakeholder groups are more frequently in opposition with each other rather than in agreement.

- The library's organizational mindset tends toward the defensive and individualistic rather than inclusive and collaborative.

- Leadership is needed at all levels.

- The public face of the library, including its brand, virtual services, marketing, and social media needs significant investment.

- The library's internal work flows and work processes need significant investment.

- The library staff racial and ethnic composition should better reflect the community.

2.4   Recommendations

Recommendations are proposed in three categories:

2.4.1   Community Recommendations

FCPL in the Context of a Changing World and County

Fairfax County is growing and becoming more complex. The dimensions of change are well known -- researched by the county, discussed in the press, and on everyone's mind every time they're stuck in traffic. Demographic change is accelerating. Fairfax County is a gateway for immigrants. For FCPL, it should balance core services while adapting for the future. FCPL needs a big, encompassing vision that can gather everything within it and get all of the stakeholders on the same page. This is a matter of leadership and a credible strategic planning process in which all parties at the planning table move forward by making equitable trade-offs.

Customer and Usage Intelligence Using Market Segmentation

A detailed market segmentation and library customer and usage analysis was prepared. There are 42 market segments in Fairfax County with the largest at over 128,000 people. The top ten segments account for over 790,000 people, almost 70% of the population. The number of library customers, non customers, and customer checkouts closely parallels the population distribution. This data is used to organize and inform service planning at both the countywide level and local branch service area level. During strategic planning, market

segmentation information should be integrated with the results of the telephone and online surveys of community residents.

Strategic Planning to Redefine Community Positioning

Following this community engagement process, the library's strategic plan will be prepared. The plan should be prepared under the direction of the Library Director, not the Library Board. The role of the Library Board should be to provide input, review interim work products, and approve the plan. A unique process should be designed with significant public input during all major phases of the work. See Figure 2: Recommended Strategic Plan Process. All parties should be invited to the table -- the Library Board, Foundation, Friends, FCPL staff, and all other community organizations and officials. The strategic plan should take both a top-down and bottom-up approach. See Figure 1: Top-Down/Bottom-Up Planning Model.

2.4.2 Service Recommendations

Service Opportunities

Services should be prioritized for children from birth to age 12 including programs, books, and a range of other resources such as grade level reading. Market segments who are families with children should be identified and understood across a range of quantitative and qualitative characteristics including library resource usage. Each outlet service area should specifically tailor its local plan of service to the share of families with children in its service area. Other identified populations (e.g., special needs, older adults, teens, etc.) should have a similar type of analysis prepared. As identified in the telephone survey, resources to be enhanced and/or expanded, after children's programs and books, include reference materials and services, adult literacy programs, services for English learners, downloadable materials, non-fiction, comfortable meeting and study spaces, homework help, and others.

Integrated Service Model

Most of the conflicts between library stakeholders that should otherwise be on the same page are due to two things: first, there is a divergence between the service models offered by FCPL (this is the biggest problem; everything flows from this); and second there's no trusted intermediary or process to resolve differences.

Service models describe the deployment of resources. Two models illustrate and draw out their differences (both models assume physical facilities). See Figure 3: Integrated Service Model.

> **Traditional service model:** the traditional service model focuses on core or foundational services such as books, discovery by browsing the shelves, resources including computers and materials for research, reference, study, and individual fulfillment, quiet spaces for learning, and rooms for meeting. The focus is on individual and family experiences.
>
> **Evolving service model:** the evolving service model focuses on quick adaptation to changing community needs, service experimentation, and partnering to achieve

shared outcomes. It utilizes a demand-based, customer-centric approach, employs an active service model, embraces changing technology, delivers services outside the building, provides multi-media resources, encourages discovery by browsing the web, offers computers and materials for research, reference, study, multiple learning styles, and individual fulfillment, and is designed for individual, family, and collaborative experiences.

FCPL is facing the very same challenges that libraries nationwide are facing to integrate these two models. There are plentiful examples from which FCPL can learn and experiment to find what's right for Fairfax County. A combined service model should be conceptualized and employed as a base in crafting the strategic plan. The combined service model can be conceived like a wedding cake, with layers rising from a base of foundational or core services that persist over time through successive layers of innovative, changing, and experimental services. See Figure 2: Integrated Service Model, above.

The strategic plan should be the first major step in a longer-term objective that creates an on-going dialog to rebuild trust between parties representing competing library service models.

Collection Development

Weeding and floating collections have been a sticking point between advocates and the library. The library's policies and procedures are well considered and align with national and professional guidelines. During the strategic planning process, we encourage fine-tuning existing policies, not a wholesale revision.

2.4.3   Organizational Development Recommendations

Staff and Organizational Health

With new leadership in place, this is an opportune time to improve organizational health. Significant resources in new methods and processes need to be invested: work as one library, not a collection of independent branches; integrate traditional and evolving service models; change the mindset to embrace change; experiment, prototype, learn how to take risks, and learn from failure; foster an organizational culture that values inclusivity and collaboration; utilize "lean" principles to adapt work flows and work processes that prioritize customer service; adopt Gallup's "StrengthsFinder" program; and, provide staff training in communication skills.

Library Board of Trustees

It is a conflict of interest that retired FCPL librarians serve on the Library Board; the Library Board must be a model of good governance. The Library Board needs to focus on strategy and policy, not operations. The problem, however, is that the library's budget is the responsibility of the Library Board. We remain concerned about the Library Board's ability to protect the budget in a competitive funding environment, and to effectively lead a united constituency to advocate before the Board of Supervisor's. In light of these recommendations, and given the need for them to be comprehensively addressed beyond

the scope of this project, we recommend that an independent study of Library Board governance be immediately undertaken.

Friends of the Fairfax County Public Library

Friends groups need to raise the level of corporate disclosure and transparency of key public documents by making them available on the library's website. Vocal advocacy by some Friends groups and/or individual members is causing confusion about the nature and role of Friends groups. Because of this confusion, we suggest that the Library Board undertake an independent study related to the ethics of advocacy.

Fairfax Library Foundation

The Foundation should be an integral part of the library's strategic planning process. Formal and informal communication channels between the Foundation and library executives should be open and frequent. Friends groups that raise significant monies that would have previously gone to the Foundation should be redirected for systemwide purposes.

3.0 Introduction

3.1   Oversight

CIVICTechnologies, in association with The Ivy Group, was retained to undertake a community engagement project to identify future library services in Fairfax County. The project was under the direction of the Library Board of Trustees. The Library Board's Planning Committee undertook direct oversight and project management.

3.2   Document Information

Summary of Emerging Themes summarizes issues and opportunities that were identified through the input methods. This information is presented in Chapter 4.0.

Recommendations describe future service opportunities. Recommendations are organized into three categories representing chapters in this report: 5.0 Community Recommendations, 6.0 Service Recommendations, and 7.0 Organizational Development Recommendations. Each of these chapters has sections that address relevant issues. Each section is organized into three subsections for consistency: background, discussion, and recommendations.

3.3   Community Engagement Input Methods

Many methods were used to obtain community input.

3.3.1   Telephone Survey of Community Residents

Please see Appendix 1: Telephone Survey and Online Survey of Community Resident

Over a five week period in the spring of 2016, a telephone survey was conducted. The goal of the survey was to gather statistically reliable information which the Library Board and FCPL's executive management team can use with confidence to develop future library service priorities. The telephone survey interviewed 1,109 people, 809 on land lines and 309 on cell phones. The telephone survey has a 95% confidence interval and with a +/-3% margin of error for the estimated 1,012,409 residents of Fairfax County who are 18+ years old. 16% of respondents were of Hispanic ethnicity, reflecting the demography for Fairfax as a whole. Calls were made during the day, at night, and on weekends to ensure that all population segments would be represented. The Ivy Group tabulated the results. In addition to the quantitative elements of the survey, an open end question captured 516 responses which are presented verbatim in 19 topic categories. The following is a summary of findings:

- 39% of respondents are male and 61% are female.

- 78% of respondents have an FCPL card.

- 30% of respondents live in a household in which a language other than English is spoken.

- 64% of respondents vote in every local election.

- 39% of respondents have used public library services two times or less in the past twelve months. For purposes of this research, these respondents are classified as non-users of library services.

- The primary reasons that non-users indicate for not using the Library are that they use the Internet to get information (28%); do not have the time to use the Library (20%), or have other places to get reading materials (10%).

- 49% of library users indicate that they have used the Library more than 12 times in the past year. Of those users, 58% are considered "power patrons," having used FCPL more than 25 times in the past year.

- Reston, Kings Park, Centreville, City of Fairfax, Chantilly, and George Mason are cited by a combined 45% of users as the locations they attend most frequently.

- Library users report that they are most satisfied with staff courtesy and customer service provision, self-checkout stations, and parking.

- Satisfaction with the Library's wi-fi, the number of computers, wait time for reserved items, and website rank the lowest of eight items surveyed. It should be noted, however, that a significant percentage of users indicate they do not know enough about the respective services to be able to express an opinion.

- While 82% of library users report that they are extremely satisfied with the Library overall only 63% report that FCPL does all it can to offer services and resources that residents need, and only 78% report that the library provides good value for the tax dollars invested.

- Respondents believe that children, individuals with special needs, and older adults are FCPL's top service priorities. Among the eight audiences rated, business owners and job seekers rank the least important.

- Resources and services deemed most important for the Library to expand or enhance are children's programs, books and materials; reference materials and services; adult literacy programs; and services for English language learners. Respondents consider DVDs and CDs, and help to apply for unemployment, social security, and health insurance to be the least important of 14 items surveyed.

- When asked about potential new service offerings, respondents express the greatest interest in off-site book drop/pick up, more self-service options, laptops or tablets available on loan, and live chat with a member of Library staff.

- By far, respondents rank email as the best way for the Library to communicate with them about its programs and services. Website ranks a very distant second.

- 63% of users and 57% of all respondents completely agree with the statement, "Fairfax County Public Library does all it can to offer the services and resources that residents need".

- 78% of users and 71% of all respondents completely agree with the statement, "The Library provides good value for the tax dollars invested".

3.3.2 Online Survey of Community Residents

Please see Appendix 1: Telephone Survey and Online Survey of Community Resident

An online version of the telephone survey was offered to the public accessible through the FCPL's website for 3.5 weeks during the spring of 2016. FCPL actively promoted the survey to its cardholders and others who visited its website. In total, 18,172 self-declared residents of Fairfax County and the City of Fairfax completed the online survey, of whom 99% are cardholders and 90% self-identify as library users, having used FCPL at least 3 times in the past 12 months. ***While the data garnered from the online survey of community residents is not statistically reliable*** – primarily given the fact that individuals self-elected to participate – offering the survey online fostered greater awareness of the outreach initiative and emphasized the Library Board's commitment to conducting a study that is both inclusive and transparent. All responses are reported anonymously. The Ivy Group tabulated the results. In addition to the quantitative elements of the survey, an open end question captured 8,215 responses which are presented verbatim.

3.3.3 Online Survey of Library Trustees and Staff

Please see Appendix 2: Online Survey of Library Trustees and Staff

An online survey of Library Trustees and staff was conducted over a 3.5 week period during the spring of 2016. FCPL promoted the survey heavily to internal stakeholders with a series of emails that encouraged participation and assured anonymity. Individuals had only to identify themselves as a Library Trustee or member of the FCPL staff. No other personal information was captured. Ultimately, a total 281 individuals participated: 8 Trustees (67% of Board members) and 273 staff members (47% of FCPL employees). All responses are reported anonymously. The Ivy Group tabulated results. In addition to the quantitative elements of the survey, an open end question captured 129 responses (5 by Trustees and 124 by FCPL staff) which are presented verbatim.

3.3.4 Public Forums

Please see Appendix 3: Public Forum Work Book

Three public forums were held. FCPL broadly publicized the public forums including notifications on its website, emails to its customer base, flyers and posters in outlets, and notifications in area newspapers, among others. The three public forums were held at the following locations, dates, and times. Sign in sheets were provided.

- George Mason Regional Library on Saturday, March 16, 2016, from 10:00 to 11:30 am. 10 people signed in.

- Chantilly Regional Library on Tuesday, April 12, 2016, from 7:00 to 8:30 pm. 66 people signed in.

- Kings Park Library on April 14, 2016, from 7:30 to 9:00 pm. 65 people signed in.

The following questions were asked at the public forums:

- What do you love about the library?

- What could the library do better?

- What services and programs should the library offer in the future?

- What are the most pressing problems in Fairfax County?

- What advice for the Library Board of Trustees as it plans for the next 3 to 5 years?

Consultants from CIVICTechnologies and The Ivy Group facilitated the forums and took notes on large format flip charts. The flip charts were posted on the walls of the conference rooms during the forum. Immediately after the forum, the flip chart sheets were photographed. CIVICTechnologies prepared a Work Book recording the proceedings including sign in sheets and flip chart photographs.

3.3.5 Focus Groups

Seven focus groups were held, as follows:

- Educators: Kings Park Library, Thursday, April 14, 2016

- Ethnic population leaders: Woodrow Wilson Library, Friday, March 18, 2016

- Parents of young children: Burke Center Library, Thursday, April 14, 2016

- Seniors 55 + years old: Chantilly Regional Library, Tuesday, April 12, 2016

- Special needs populations: Woodrow Wilson Library, Friday, March 18, 2016

- Teens: Chantilly Regional Library, Tuesday, April 12, 2016

- Young professionals: George Mason Regional Library, Saturday, March 19, 2016

Participation was low in the focus groups for parents of young children, young professionals, and ethnic population leaders. The parents focus group was organized after a storytime; the number of storytime participants was lower than expected. The young professionals who confirmed their participation did not show up. The reasons for nonattendance stated by invited ethnic population leaders included that the days/times were not convenient for their schedule and that the location was too far to drive.

3.3.6 Stakeholder Interviews

Stakeholder interviews were held with Fairfax County public, nonprofit, and private sector leaders. A list of stakeholders to be interviewed was prepared in collaboration with the Library Board's Planning Committee. Stakeholder interviews were 30 minutes in duration. Some interviews were held in person and some on the telephone. Stakeholders were asked to discuss what they thought were the critical issues facing the county now and over the next three years; and/or, what library services were of concern to local constituents. Interviews were confidential.

- Terry Angioletti, Executive Director, Centreville Immigration Forum

- Nannette Bowler, Director, Fairfax County Department of Family Services

- Evan Braff, NCS Region 4, Director of Neighborhood and Community Services, Fairfax County

- Sharon Bulova, Chair, Fairfax County Board of Supervisors

- Adrian Chapman, President and Chief Operating Officer, WGL Holdings, Inc. and Washington Gas

- John Cook, Member, Fairfax County Board of Supervisors

- Jim Corcoran, President & CEO, Northern Virginia Chamber of Commerce

- Kathryn Falk, VP, Public & Governmental Affairs for Virginia Region and Market Leader for Northern Virginia Operations

- John Foust, Member, Fairfax County Board of Supervisors

- Pat Herrity, Member, Fairfax County Board of Supervisors

- William Hwang, President Korean American Association of Northern Virginia

- Bobbie Kilberg, President and CEO of the Northern Virginia Technology Council

- Ed Long, Fairfax County Executive

- Joe Martore, CEO, Calibre Systems, Inc.

- Dave Molchany, Fairfax County Deputy County Executive

- Bud Morrissette, CEO, Interstate Family of Companies

- Nandred Navarro, Director of Community Based Services, Alternative House

- Linda Patterson, Executive Director, Lorton Community Action Center

- Cheryl Piper, Friends of Access Services

- Harold Pyon, Deacon, Korean Central Presbyterian Church (KCPC) and Chairman, Korean Community Service Center

- Catherine Riley, Vice President, Marketing, Fairfax County Economic Development Authority

- Todd Rowley, Commercial Market Executive, Senior Vice President, Cardinal Bank; Executive Committee Member and Board of Directors Member, Northern Virginia Chamber of Commerce; Chairman and Board of Directors Member, Northern Virginia Workforce Investment Board; and Member, Board of Directors and Fairfax County Representative Northern Virginia Community College

- Bob Sisson, City Manager, City of Fairfax

- Linda Smyth, Member, Fairfax County Board of Supervisors

- Patricia Stevens, Executive Director, Office of Public Private Partnerships

- Linda Sullivan, President and CEO, Arts Council of Fairfax County

- Gloria Sussman, Friends of Access Services

- Tim Thompson, President, Fairfax County Federation of Civic Associations

3.3.7 Advocate Interviews

Five interviews were held with library advocates. Two interviews were held in one-on-one meetings and the other three interviews were held in small group settings. The one-on-one interviews were held in person and were 30 minutes in duration. A range of topics was discussed. Interviewees were Kathy Kaplan; Dennis Hays, Fairfax Library Advocate; and Susan Harman, Executive Director, Fairfax Library Foundation. The small group interviews were 1.5 hours in duration and were held at the George Mason Regional Library and the Kings Park Regional Library. Interviews were confidential.

3.3.8   Confidential Emails

A unique, confidential email address to receive public comments and questions about the community engagement project was available at fairfax@librarystrategy.com. Emails sent to this address were only accessible and viewed by CIVICTechnologies staff. This email address was referenced on FCPL's web page for the engagement project and as a link embedded in emails that FCPL sent notifying customers about different engagement activities such as public forums and the availability of the online public survey.

Approximately 120 confidential emails from members of the public were received by CIVICTechnologies. There were four types of emails: 1) people offering suggestions or recommendations for future library services; 2) people confirming attendance at a public forum; 3) people stating that they had relocated outside of the county; and 4) people asking questions about the launch date of the public online survey. CIVICTechnologies responded to most all emails to affirm receipt and to note that suggestions or recommendations would be considered in the preparation of this report to the Library Board.

3.3.9   Library Website Page for the Engagement Project

A page on the FCPL website has been available during the course of the engagement project. The purpose of the page is to inform the public about the project including an introduction, background, ways to give input, updates, schedule, and process roadmap, and FAQs.

> More information:
>
> http://www.fairfaxcounty.gov/library/aboutthelibrary/bot-public-engagement-initiative.htm

3.3.10 Market Segmentation Customer and Usage Analysis

Please see Appendix 5: Market Segmentation Background Information and Customer and Usage Analysis

CIVICTechnologies prepared an integrated market segmentation analysis of the county's population and FCPL's customers and their usage. The analysis presents a wealth of information about usage patterns across the county at the census block group level. A range of measures was employed.

Market segmentation is the categorization of existing or potential customers into groups based upon common characteristics such as age, gender, income, and geography or other attributes relating to consumption behavior. Market segmentation answers the questions: Who are our best customers? What are they like? How do we communicate with them? And where can we find more like them?

Market segmentation data combined with library transactional data leads to insights about library usage patterns. Using this data we can answer the questions: who are we serving and not serving; and, what are implications with respect to eight domains of service: customer

growth, checkouts and collection development, programs and events, staff alignment, partnerships, consumer technology, use of facilities, and marketing/communications.

A market segmentation analysis of FCPL cardholder and checkout usage patterns was prepared utilizing the "LandScape" market segmentation system from Synergos Technologies, Inc. (STI), Austin, TX. Data sources comprising LandScape include U.S. Census data, STI demographic updates and projections, consumer market surveys, workplace data, and others.

3.3.11   Library Managers Market Segmentation Workshop

Please see Appendix 5: Market Segmentation Background Information and Customer and Usage Analysis

An interactive Community Analytics Workshop was held with library managers on April 5, 2016, at the Chantilly Regional Library from 9:00 am to 4:00 pm. The workshop focused on the market segmentation library usage analysis described above. The facilitated workshop was informative and engaging. Participants addressed three questions:

- Who is using and not using the library?

- Are there any surprises?

- What are implications on eight domains of library service: customer growth, checkouts and collection development, programs, staff alignment, marketing and communications, consumer technologies, use of facilities, and partners?

The Workshop had two parts: the morning was an introduction to the data concepts including the language of market segmentation, a summary of county wide library usage patterns, and an example of how the data can be applied to the neighborhoods around a branch library. The afternoon organized participants into small groups for an interactive work session to analyze and interpret the data, answering the questions above. The Workshop was modeled upon successful processes used for public libraries in Dallas, Denver, Milwaukee, Las Vegas-Clark County, Santa Clara County, and Virginia Beach, among others.

Prior to the Workshop, a Briefing Book was prepared with background information, data analytics, workshop process description, segment definitions, and FAQs. Participants benefited from three intended outcomes:

- Identify county wide library customer and usage patterns including who is and is not using the library

- Learn the language of data and market segmentation including how to integrate data with values

- Work together to identify service responses to community opportunities that will inform the findings presented to the Library Board

3.3.12   Library Staff Project Orientation Meetings

Two library staff orientation meetings were held at the outset of the project. The meetings were held at Herndon and Richard Byrd. The meetings were one hour in duration. The consultants presented information about their backgrounds, the project roadmap and process, scope of work, work products, and schedule.

3.3.13   Library Staff Interviews

Interviews were held with library managers. Interviews were 30 minutes in duration. The purpose of the interviews was to inform CIVICTechnologies about FCPL functions, processes, and community relationships. The following questions were asked:

- What does your department do and what do you do?

- What obstacles do you face?

- What needs do you have?

- What are the opportunities?

The following people were interviewed; interviews were confidential.

- Access Services: Janice Kuch

- Acting Deputy Director: Jane Goodwin

- Branch Services: Nancy Ryan and Pat White-Williams

- Circulation Services: Chris Bartholomew

- Customer Service: Katie Strotman

- Internet Services: Ed Kukulka, Jim Seeley, Steve Walker

- Deputy Director: Christine Jones

- Human Resources: Beverly Lange

- Marketing: Mary Mulrenan

- Organizational Development: Moira Folsom

- Programs and Education Services: Bobbie Conners, Renee Edwards, Ted Kavich

- Staff Development Services: Danielle Hopson and Bonnie Kline

- Strategic Planning: Doug Miller

- Support Services: Robin Albert, Margaret Bercher, Betsy Keefe

- Technology Division: Bob Cappello, Robert Harvey, Margaret Kositch

- Volunteer Services: Erin Chernisky

3.3.14 Access Service User Interviews

Two interviews were held with Access Service users; interviews were confidential. Access Services removes barriers to library services for people with permanent and temporary disabilities. Services include assistive technologies, deposit collection service, home delivery service, special collections, talking book program, and others.

4.0   Summary of Emerging Themes

The following major themes emerged from research and observations. These themes are developed into recommendations below.

- The organizational health of the library, the Library Board, and the Friends groups needs to improve.

- The library needs a vision about its role in the community.

- The library is torn between fulfilling a traditional service model and an evolving service model. The vocal advocates support the traditional service model. The voices supporting an evolving service model to meet changing county conditions need to be heard, too.

- Survey results indicate that library staff and the community are out of sync on library service priorities. Survey results also indicate that the library has a strong overall satisfaction level. There is significant room for improvement by offering services and resources that residents have identified.

- Across a range of eight statements about the work of the Library Board, survey results indicate that the Library Trustees see greater success than do staff in all but one area.

- Stakeholder groups are more frequently in opposition with each other rather than in agreement.

- Some library advocates laud the professionalism of some MLS degreed librarians while simultaneously deriding the professionalism of MLS degreed collection development librarians.

- The library's organizational mindset tends toward the defensive and individualistic rather than inclusive and collaborative.

- Leadership is needed at all levels.

- The public face of the library, including its brand, virtual services, marketing, and social media needs significant investment.

- The library's internal work flows and work processes need significant investment.

- The library staff racial and ethnic composition should better reflect that of the community.

In order to address these themes, we have organized recommendations into three chapters with sections as follows:

- Community Recommendations

- ○ FCPL in the Context of Changing County and World

  - ○ Customer and Usage Intelligence Using Market Segmentation

  - ○ Strategic Planning to Redefine Community Positioning

- ● Service Recommendations
  - ○ Service Opportunities

  - ○ Integrated Service Model

  - ○ Collections Development

- ● Organizational Development Recommendations
  - ○ Staff and Organizational Health

  - ○ Library Board of Trustees

  - ○ Friends of the Fairfax County Public Library

  - ○ Fairfax Library Foundation

5.0 Community Recommendations

There are three items in Community Recommendations: FCPL in the Context of a Changing County and World, Customer and Usage Intelligence Using Market Segmentation, and Strategic Planning to Redefine Community Positioning.

5.1 FCPL in the Context of a Changing County and World

5.1.1 Background

Fairfax County is growing and becoming more complex. The dimensions of change are well known -- researched by the county, discussed in the press, and on everyone's mind every time they're stuck in traffic. Demographic change is accelerating. Fairfax County is a gateway for immigrants. The human dimension presents new neighbors of varying races and ethnicities, new opportunities for differing perspectives, and a greater capacity for understanding. The local post-recession economy is diversifying and restructuring given federal defense spending reductions, the growth of small businesses, and the entrepreneurship of immigrants. Public services are trying to keep up with a growing population and a growing demand for services, and evolving service needs. There is a large population of adults with low literacy and digital skills. Schools are striving to deliver a quality education that will sustain the quality of life and economic well-being. County agencies are starting to encompass concepts about collective action to leverage limited funds and accelerate attainment of outcomes.

More information:

http://www.fairfaxcounty.gov/government/about/data/

http://www.fairfaxcounty.gov/demogrph/find_by_topic.htm

http://www.census.gov/quickfacts/table/PST045215/51059

http://www.fairfaxcountyeda.org/facts-and-figures

5.1.2 Discussion

For FCPL, like for public libraries nationally, the urgency to respond to the current and emerging circumstances of our rapidly changing world is real:

Social: aging populations, increased diversity, customization, personalization, culture of experience, social media, face2face, digital natives vs. digital immigrants

Learning: engaged learning, connected learning, project-based learning, collaborative processes, 21st Century literacies, and learning through social media

Economic: budget cuts, restructuring, alliances, community initiatives, agency services offered online, continuous job evolution, economic diversification, small business impact, and 21st Century workforce skills

Technology: exponential change, fast adoption, rising demand for downloads, devices, wi-fi, cloud, mobile apps, and digital divide

Competition (facing libraries): Google, Amazon, Facebook, Wikipedia, bookstores, and Starbucks

In the face of these tangible and seemingly all encompassing challenges and changes, a central question facing libraries in general and FCPL, in particular, is to balance core services (e.g., reading, literacy, a safe place, having questions answered by professionals, gathering and sharing, and so on) with evolving services that meet current and emerging societal conditions. And, to do it in context of reduced funding.

5.1.3 Recommendations

We offer the following recommendations.

FCPL should respect core services while adapting and preparing for the future. FCPL needs a big, encompassing vision that can gather everything within it and get all of the stakeholders on the same page to pull in the same direction. This is a matter of broad-based leadership and a credible strategic planning process in which parties come to the planning table prepared to move forward by making equitable trade-offs.

Broad-based leadership includes the library's executive/administrative team, library managers within divisions and departments, Library Trustees, county executives, and County Supervisors.

A big challenge, in this context, is the library's budget. Disagreement between parties keeps them from presenting a unified front. This conflict prevents them from getting the result they all want -- more money for the library.

Furthermore, the library must become more efficient and adept at workflows and work processes. It is imperative to employ well-tested methods such as Gallup StrengthsFinder and lean principles as described in section 7.1.3.

Embracing the following principles present opportunities to balance core and emerging services:

- Relevance is local. Libraries have to know who are they're serving and not serving, and tailor services to the needs of people community by community and county wide.

- The core human qualities that libraries serve don't change -- but the ways of serving them do. Those qualities are creativity, curiosity, learning, and community. Traditional core services are evolving to engage people through experiences at the

library: creativity by creating content, curiosity by active and engaged learning, solutions through teamwork, and community through collaborative teamwork.

- Libraries are trusted intermediaries, connected, and widely distributed.

  - Libraries are trusted because they provide access to all, are nonjudgmental, respectful, and treat all fairly and equitably.

  - Libraries are connected -- in Fairfax, there are nearly 400,000 FCPL customers (over a third of the county population) spread throughout the county in every neighborhood.

  - Libraries are widely distributed -- in Fairfax, there are 23 FCPL branches, plus Access Services, in a diverse range of locations.

- Librarians and other library staff are becoming facilitators and coaches. In addition to their well established roles, librarians and other library staff are using new tools to engage the changing needs of their communities.

- Next generation services are boundless. Libraries are both physical and virtual, inside their dedicated buildings and available wherever people are.

- Libraries are shifting to an active service model. Libraries are no longer waiting for people to come in the door or logon. Libraries are instead becoming demand-driven and customer centric.

5.2 Customer and Usage Intelligence Using Market Segmentation

5.2.1 Background

See Appendix 5: Market Segmentation Background Information and Customer and Usage Analysis

A detailed market segmentation and library customer and usage analysis was prepared. A summary of the results is presented in the discussion below. Appendix 5: Market Segmentation Background Information and Customer and Usage Analysis provides the comprehensive information behind the following summary. Appendix 5 also contains one-page descriptions of each of the segments.

5.2.2 Discussion

Segments by population: There are 42 market segments in Fairfax County. The largest is named "Couples with Capital" with 128,172 people or 11.1% of the population. The second largest segment is "Urban Squires" with 111,362 people (9.7% population share). The third largest segment is "The Sweet Life" with 104,793 people (9.1% share).

Top 10 segments: the top 10 segments account for about 790,000 people or 69% of the population. Nearly seven in ten people county wide are in these 10 segments. The remaining

population is in 32 segments accounting for 361,071 people or about 11,300 people per segment, about one percent each.

Customers parallel population distribution: the number of library customers by segment closely parallels the population distribution described above. There are 391,557 customers. Couples with Capital has 45,613 customers (11.6%) followed by Urban Squires with 41,022 customers (10.5%). The top ten segments account for 72% of the customers, or about 281,250 customers.

Non customers parallel population distribution: the number of library non customers by segment parallels population distribution. There are 759,970 non customers. The segment with the highest number of non customers are Couples with Capital with 82,559 non customers (10.9%) followed by The Sweet Life with 71,337 non customers (9.4%) and Urban Squires with 70,340 non customers (9.3%).

Customer checkouts parallel population distribution: the number of customer checkouts parallels the population distribution. Couples with Capital made 12.6% of the checkouts in the analysis period followed by Urban Squires with 11.5% and a segment named "Empire Builders" with 10.3%. The top ten segments made three-quarters of the checkouts (75.5%).

County wide market share and market potential: slightly over one-third of the county's population have FCPL cards. FCPL's market share is 34%. Market share is the percentage of the population that have library cards. The inverse of market share is market potential -- 66% of the population do not have library cards.

Segments with the largest and smallest market share and market potential: Grand Masters is the segment with the largest market share at 42% (58% market potential). The segment with the smallest market share is Collegian at 11% (89% market potential).

Market potential distribution: of the 42 segments in Fairfax County, six segments have market potential have between 80 and 100%. These six segments have few customers; their potential for customer growth is very high. Twelve segments have between 70 and 79% market potential; 24 segments have between 60% and 69% market potential; and 1 segment is in the range of 50% to 59% market potential.

Customer growth potential: the segments with the largest growth potential -- that is, the potential to add new cardholders -- is Couples with Capital followed by The Sweet Life, Urban Squires, Empire Builders, and Apprentices.

Average checkouts: the segments with the highest average checkouts per customer for the period analyzed are East Meets West at 3.2 checkouts per customer followed by Marquis Class at 2.4; Grand Masters and Bonds and Babies each at 2.3; and Empire Builders and Urban Squires each at 2.2.

Diversity Index: Diversity Index measures the likelihood of two or more people being from different racial or ethnic backgrounds. The average Diversity Index in the United States is 0.5. The lower the Diversity Index number, the higher the diversity; the higher the number, the lower the diversity. In Fairfax County, the average Diversity Index is 0.46, just above the

U.S. average. Furthermore, 8 segments have significantly high diversity between 0.2 and 0.3; 14 segments are between 0.3 and 0.4; 12 segments are between 0.4 and 0.5; and only 8 segments are above 0.5.

Hispanic population: approximately 185,000 people or 16% of the population is ethnically Hispanic across all races. Segments with the highest Hispanic population are Urban Squires with about 17,000 people followed by The Sweet Life with about 16,000 people, Sitting Pretty and Couples with Capital, each with about 13,000 people, The Singles with about 12,000 people, and Los Padres with about 11,000 people. The last two of these segments are predominately Hispanic; approximately 60% of each segment is self-defined as Hispanic. Interestingly, of all of these segment, only The Singles and Los Padres have incomes below the US median income. In other words, the largest Hispanic populations are in middle class segments.

5.2.3 Recommendations

We offer the following recommendations.

The library's strategic planning process should integrate these market segmentation findings with the results of the telephone and online surveys of community residents. Recommendations are presented in section 6.1.

5.3   Strategic Planning to Redefine Community Positioning

5.3.1 Background

Following this community engagement process, a strategic plan will be prepared for the library. The strategic plan will guide FCPL's community positioning, budgeting, investments, services, initiatives, and actions, both systemwide and by branch. This engagement process, as noted above, is under the direction of the Library Board. As currently structured, the preparation of the strategic plan was also to be directed by the Library Board.

5.3.2 Discussion

The normal process that public libraries use in strategic planning is to obtain public input and then prepare a draft plan, share that draft with the public to get feedback, and then prepare revisions, receive approval, and move forward with implementation.

Based upon our extensive experience in preparing strategic plans for libraries of comparable size and complexity as FCPL, this "normal" process is unlikely to lead to successful results. Our experience is that the community expects involvement throughout the strategic planning process, not just at the beginning and at the end. A more engaged strategic planning process benefits both the library and the community.

Many libraries are preparing their strategic plans utilizing a top-down/bottom-up model developed by CIVICTechnologies. See Figure 1: Top-Down/Bottom-Up Planning Model. The

top-down approach provides county wide library service strategies that meet county wide needs. The bottom-up approach provides branch service area service strategies that are uniquely tailored to meet local neighborhood and community needs. The county wide service plan and each branch level service plan are vertically integrated and consistent with clearly defined service delivery distribution channels.

Figure 1: Top-Down/Bottom-Up Planning Model
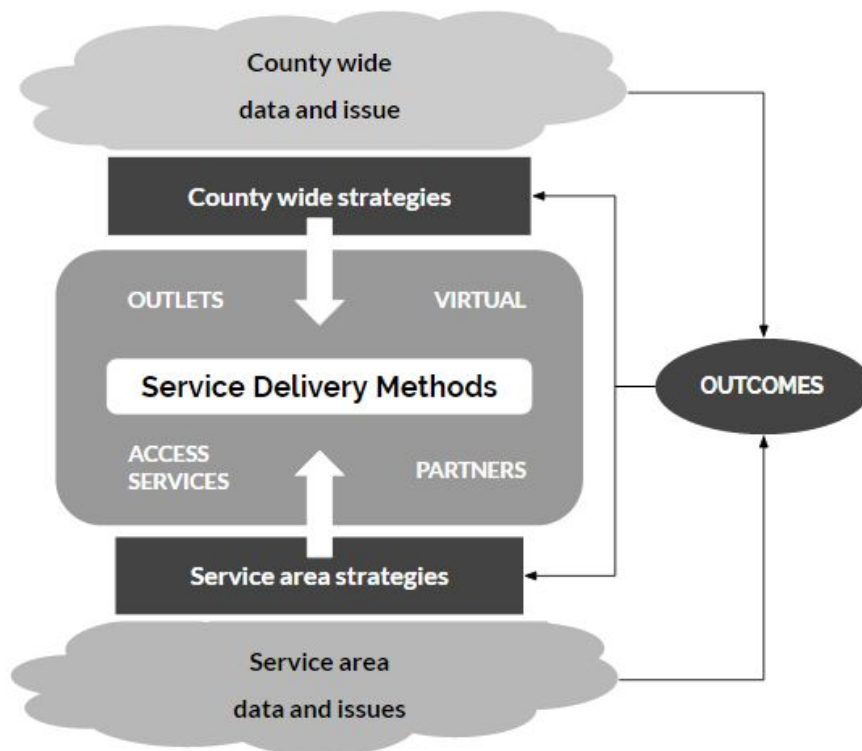
5.3.3 Recommendations

We offer the following recommendations.

First, the strategic plan should be prepared under the direction of the Library Director, not the Library Board. The Library Board's role would be to provide input, review interim work products, and approve the plan.

Second, the strategic plan should have a limited duration (i.e., nine months) and stay focused on delivering pre-defined results (products).

Third, a unique process should be designed for undertaking the strategic plan building upon this community engagement project. The recommended methodology is illustrated in Figure 2: Recommended Strategic Plan Process.

Figure 2: Recommended Strategic Plan Process
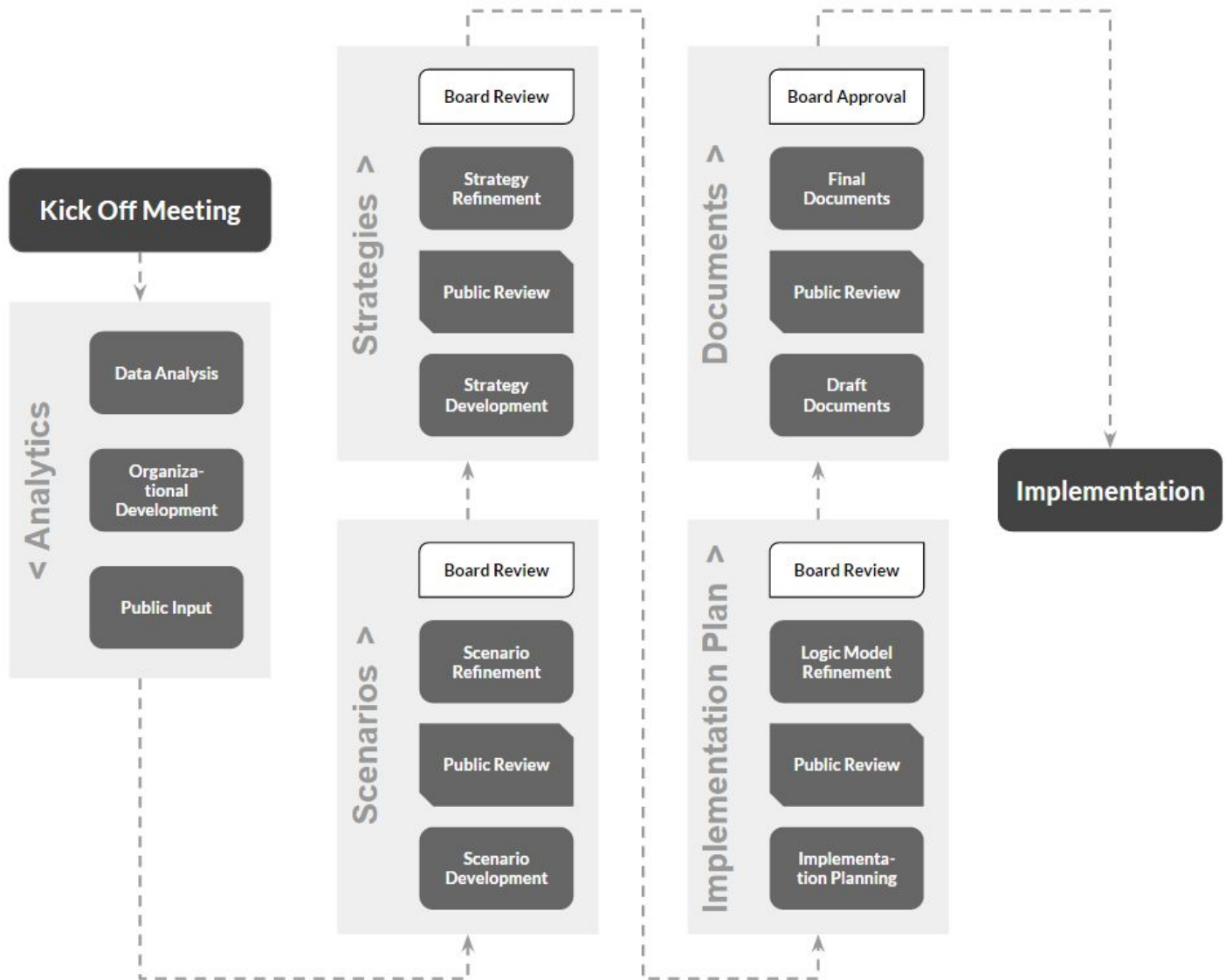
Fourth, it is important that all stakeholders -- the Library Board, Foundation, Friends, FCPL staff, and all other community organizations and officials -- come to the table asking what

they can do for the library as an integral part of the community, not what the library's strategic plan can do to advance their interests.

Fifth, the strategic plan should take both a top-down and bottom-up approach, as described above. This includes preparing a vertically integrated service plan with overarching county wide services and locally tailored branch service area plans.

6.0 Service Recommendations

There are three items in Service Recommendations: Service Opportunities, Service Model, and Collections Development.

6.1 Service Opportunities

6.1.1 Background

The community engagement project sought public input on future services. The major input methods included the following:

- Advocate interviews

- Focus groups

- Market segmentation and library usage analysis

- Online survey of community residents

- Online survey of Library Trustees and staff

- Public forums

- Staff interviews

- Stakeholder interviews

- Telephone survey of community residents

Of these, only the telephone survey and market segmentation analysis were independent measures of potential future library services. The online public survey, while not an independent measure, has many parallel results to the telephone survey.

6.1.2 Discussion

There were three questions in the telephone (and online) survey which specifically address future service opportunities. Rankings discussed below are based upon the telephone survey results.

- Question 7 identified the "population groups rated 'Extremely Important' for FCPL to serve." The highest ranked segments are children ages 9 to 12 and children preschool to age 8. These are followed by individuals with special needs, older adults, teens, English language learners, job seekers, and business owners.

- Question 8 identified the "resources and services rated 'Extremely Important' for the library to expand/enhance." Ranked highest, by far, are children's programs and

children's books and materials. These are followed, distantly, by reference materials and services, adult literacy programs, services for English learners, downloadable materials, non-fiction, comfortable meeting and study spaces, homework help, computer and tech training, author talks & book groups, and fiction and bestsellers.

● Question 9 identified the "potential technology offerings in which respondents are 'Extremely Satisfied'." Ranked highest are off-site book drop off/pick up. This is followed by more self-service options, laptops and tablets available on loan, live chat for customer questions, playaway for children, and 24-hour book vending machines.

The following questions in the telephone and online surveys of residents address issues directly impacting potential future services. Rankings discussed below are based upon the telephone survey results.

● Question 6 identified the "Library resources and services with which users are 'Extremely Satisfied'." Ranked highest are staff courtesy and customer service provision. This is followed by overall satisfaction with the library, self-checkout stations and parking, hours, the library's website, wait time for reserved items, the number of computers, and library wi-fi. Multi-lingual respondents report greater satisfaction with the library's wi-fi service.

● Question 6 results were cross tabulated against branch location used most often. Data from the telephone survey indicates that users are least satisfied with library hours at the Dolley Madison, Tysons-Pimmit, Thomas Jefferson, and John Marshall branches.

● Question 4 identified the "primary reason that people do not use FCPL at all or more frequently." Ranked highest by far are respondents use of the internet to get information. This is followed by lack of time and that people have other places to get books, DVDs, and other resources.

● Question 10 identified the "respondents indicating *complete agreement* with the following statements:

  ○ "FCPL does all it can to offer services and resources that residents need." The results here are disappointing: 57% of all telephone survey respondents, 63% of telephone survey users only, and 60% of online survey respondents.

  ○ "The Library provides good value for the tax dollars invested." The results here are good but leave room for improvement: 71% of all telephone survey respondents, 78% of telephone survey users only, and 78% of online survey respondents.

  ○ Question 11 identified the "preferred means of receiving information from the Library." Ranked highest by an order of magnitude is email. This is

followed distantly by the Library's website, flyers/signage in the Library, e-newsletter, social media, and calendar of events.

6.1.3   Recommendations

We offer the following recommendations.

It is interesting that one part of the telephone survey indicates an overall satisfaction with the library at 82% while other parts indicate 1) that only 63% report that the library does all it can to offer services and resources that meet resident needs; and 2) that only 78% believe the library provides good value for the tax dollars invested. These differences reveal that while users are mostly satisfied with what they're getting from the library, they believe that the library can do significantly better.

Services should be prioritized for children from birth to age 12 including programs, books, and a range of other resources. This should include children reading at grade level, particularly 3rd grade.

Market segments who are families with children should be identified and understood in depth across a range of quantitative and qualitative characteristics (i.e., demographics, lifestyle, consumer spending, consumer preferences, occupations, and communication channels). In depth cardholder and usage analysis of these segments should be undertaken for such topics as checkouts, computer use, program attendance, and summer reading participation, among others. Each outlet service area should specifically tailor its local plan of service to the share of families with children in its service area.

Other identified populations (e.g., special needs, older adults, teens, English language learners, job seekers, and business owners) should have a similar type of analysis and planning prepared as described above for segments with children.

As identified in the telephone survey, resources to be enhanced and/or expanded, after children's programs and books, include reference materials and services, adult literacy programs, services for English learners, downloadable materials, non-fiction, comfortable meeting and study spaces, homework help, computer and tech training, author talks & book groups, and fiction and bestsellers. These resources should be considered as part of the analysis and planning process.

6.2   Integrated Service Model

6.2.1   Background

Over the last few years, in the face of significant budget cuts, some library advocates and FCPL staff have contested library plans, policies, and procedures especially with respect to collection development and floating collections. The nature of the disagreements masks two things that are at the center of the matter -- divergent service models and no trusted intermediaries or processes in which problems can be addressed.

6.2.2 Discussion

First, there is a divergence between the service models offered by FCPL. This is the biggest problem; everything flows from this.

Second, with no trusted intermediary or process to bridge the sides, dialog and engagement to resolve differences cannot occur.

Service models are mental constructs that define one's expectations about resources the library should provide or emphasize, and things it should do. Two model descriptions are presented below to illustrate and draw out their differences; both models assume physical facilities. See Figure 3: Integrated Service Model.

> **Traditional service model:** the traditional service model focuses on core or foundational services such as books, discovery by browsing the shelves, resources including computers and materials for research, reference, study, and individual fulfillment, quiet spaces for learning, and rooms for meeting. The focus is on individual and family experiences.
>
> **Evolving service model:** the evolving service model focuses on quick adaptation to changing community needs, service experimentation, and partnering to achieve shared outcomes. It utilizes a demand-based, customer-centric approach, employs an active service model, embraces changing technology, delivers services outside the building, provides multi-media resources, encourages discovery by browsing the web, offers computers and materials for research, reference, study, multiple learning styles, and individual fulfillment, and is designed for individual, family, and collaborative experiences.

Figure 3: Integrated Service Model
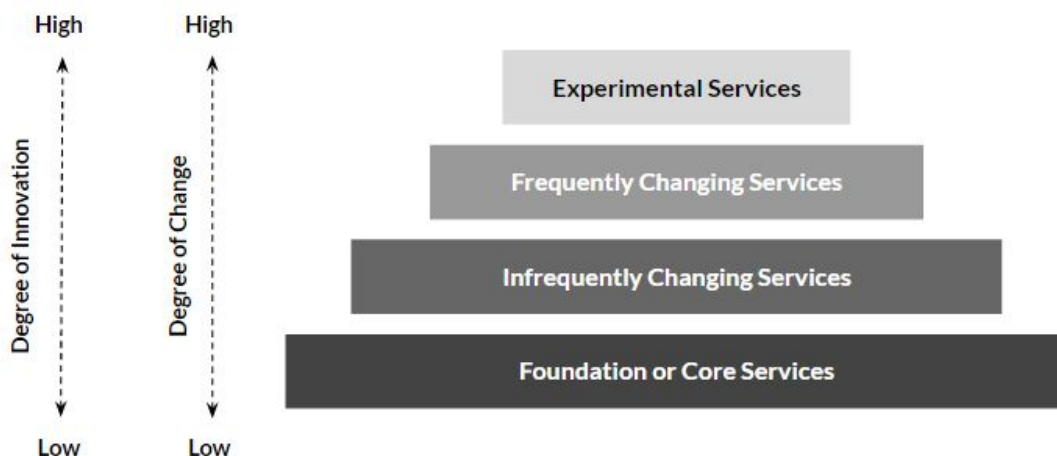
FCPL is facing the very same challenges that libraries nationwide are facing to integrate these two models. There are plentiful examples from which FCPL can learn and experiment to find what's right for Fairfax County. Combining the traditional and evolving service models will help all users adjust to the rapidly changing world in which we live while imparting to youth and new users the civic and cultural values represented so well by the traditional model.

6.2.3   Recommendations

We offer the following recommendations.

First, a combined service model should be conceptualized and employed as a base in crafting the strategic plan. The combined service model can be conceived like a wedding cake, with layers rising from a base of "traditional services" that persist over time through successive layers of "contemporary services" that change over time. Moving from traditional to contemporary service model, the institution values innovation, experimentation, and risk-taking, and evolving into a learning organization. See Figure 2: Integrated Service Model.

Second, the upcoming strategic plan should be the first major step in a longer-term objective that creates an on-going dialog to rebuild trust between competing library service models. With the intention of achieving consensus around a shared vision, structured trade-offs are visible and parties not willing to make tradeoffs are set apart.

6.3   Collection Development

6.3.1   Background

There has been significant controversy over the library's weeding and floating collection policies and practices. The community concerns were voiced in stakeholder meetings, advocate meetings, public forums, direct communication, and online surveys.

Weeding is defined as the removal of materials from a library collection in a planned and systematic way. The deselecting process is an ongoing part of collection development, a deliberate and thoughtful activity that will keep the library current and vital.

> More information:
>
> http://www.accessola.com/osla/toolkit/Resources/Weeding%20Brochure.pdf
>
> https://www.tsl.texas.gov/sites/default/files/public/tslac/ld/pubs/crew/crewmethod08.pdf
>
> http://www.ala.org/tools/libfactsheets/alalibraryfactsheet15

A floating collection is defined as a systemwide collection wherein there is no owning branch designation. An item checked out from one branch and returned to a different branch stays at the branch to which the item was returned.

-   From Wendy K. Bartlett, Floating Collections - A Collection Development Model for Long-Term Success, Libraries Unlimited, January 2014

    More information:

    https://infopeople.org/sites/all/files/webinar/2010/eureka-floating-collections/floating_collections.pdf

    http://www.abc-clio.com/ABC-CLIOCorporate/product.aspx?pc=A3347P

FCPL has evolved, over time, specific policies and practices for weeding and floating collections. The following is a link to the document "Collection Development & Management at the Fairfax County Public Library" dated December 2, 2014:

    http://www.fairfaxcounty.gov/library/news/collection.pdf

6.3.2 Discussion

A group of library advocates, apparently in consultation with sympathetic library staff and a small number of other cardholders, have taken issue with library's weeding and floating collections policies and practices.

The library advocates' complaints are that weeding and floating removes important literature and classics from collections because the items do not get heavy use. These items belong in the collections for civic, cultural, and enrichment reasons. They are also concerned that removal diminishes browsing and reduces people's exposure to quality resources, leaves facilities with empty shelves, doesn't properly apply public funds, and mishandles county assets (e.g., books). Some advocates go even further to imply that the reduced number of books is part of a plan to remove them so that branches will be shuttered, replaced by a virtual or all-digital system; or, that branches will be shuttered and transformed into community centers with few books and other typical library resources.

The library's weeding and floating policies and procedures are well considered and align with national and professional policies and practices including devolving decisions to the local branch level. Furthermore, in the face of controversy about weeding and floating, the library participated in an inclusive collection development planning process. The public-private ad hoc committee "Floating Collections and Discards Committee of the Board of Trustees of the Fairfax County Library" provided significant opportunities for public input and open discussion about weeding and floating.

6.3.3 Recommendations

We offer the following recommendations.

Library advocates on-going concerns about weeding and floating should be addressed again. Specifically, two perspectives should be addressed:

- That the policies and practices don't address their specific concerns cited above (i.e., the removal of important literature and classics, diminished browsing opportunities, and people's exposure to quality resources).

- That their concerns are indicative of a larger problem -- that problem actually concerns a new model of library service that will replace a traditional model library advocates want to protect.

Without addressing these two perspectives, weeding and floating are likely to remain sticking points for some library advocates and community members.

To move on, we advise FCPL not to dismiss advocate's concerns but instead to address them in a positive spirit. We suggest taking an updated look at the existing collection development policies and procedures with respect to weeding and floating as part of the strategic planning process. This updated look is not opening up the entire policy for wholesale revision. Instead, it should be considered a periodic update to revise aspects of the policy that need fine-tuning.

Both sides need to come to the table with mutual respect for the educational qualifications and professionalism of FCPL staff on the one hand, and for the advocate's concerns on the other. Collection development policy changes should be planned within the following guidelines:

- In the context of an evolving library service model and technology changes

- To implement desired future service priorities (e.g., children) identified by the community in this engagement project

- As part of the strategic plan's inclusive public process

- Led by the FCPL's professional staff

- With decisions made in a timely manner as part of the strategic planning schedule

7.0 Organizational Development Recommendations

There are five items in Organizational Development Recommendations: Staff and Organizational Health, Library Board of Trustees, Friends of the Fairfax County Public Library, and Fairfax Library Foundation.

7.1 Staff and Organizational Health

7.1.1 Background

FCPL is moving forward under new executive and Library Board leadership. This is a terrific opportunity that should be embraced to improve organizational health. The starting point for moving forward is to address the symptoms:

- Only 273 staff members or 47% took the online Library Trustee and staff survey associated with this project.

- Library staff priorities and community needs are out of sync.

  Comparing Trustee and staff opinions with feedback from Fairfax residents who responded to the telephone survey reveals a disconnect between the Library and the residents it serves. While 52% of internal stakeholders believe services to *Younger Elementary School Age Children* should be increased, and 50% believe *Preschool Children and Their Families* deserve increased services, over 80% of telephone survey respondents believe it is extremely important to expand or enhance children's programs, books and materials (Question 7). In fact, the public ranks children's services as the area it most wants to see the Library expand. It would seem that the Library's internal stakeholders do not share that opinion, ranking all but *Business Owners* a higher priority than preschool and elementary school children.

- While many managers and front-line staff work very hard and care deeply about their local community, they don't feel appreciated or properly equipped to meet service demands.

- Generally speaking, the organizational mindset is defensive and individualistic not inclusive and collaborative.

- Many branches operate as if they are autonomous from the county wide system.

- The loyalty of some branch managers and staff is with library advocates instead of the organization.

- Library administration has not provided the methods or tools to move the organization as a whole forward.

- Of those who took the online survey (see note 1):

  - Only 58% agree that patron preferences and needs drive collection development.

  - Only 49% agree that the library has an efficient process for ordering and processing new materials.

  - Only 39% agree that the library makes the best possible use of technology for efficient work flow.

  - Only 26% agree that staff is appropriately allocated across the system and individual departments for the type and volume of work required.

- Innovation, risk-taking, and experimentation are not valued.

- The library's staff does not reflect the changing racial and ethnic composition of the people they serve.

- Branding is non-existent -- there is no brand promise, brand identity, or brand message.

- The library has no virtual branch strategy and there are only a few staff that "get" the potential of this idea, what it can offer, and how transformative it can be. In this vein, the website is woeful, marketing is significantly undervalued by the organization, and social media is not fully developed.

(1) "Agree" represents the total percentage of respondents who indicated either "Strongly Agree" or "Somewhat Agree."

7.1.2 Discussion

Improving the library's organizational health should be a top priority for the library's executive management, the Library Board, and the County's executive administrators. All three of these bodies need to be in alignment and of one mind. Significant resources and new methods and processes need to be dedicated to improving the library. To be clear, this is not a staff training issue. It is an organizational development issue.

7.1.3 Recommendations

We offer the following recommendations:

First, the County Board of Supervisors, the Library Board, and FCLP needs to make a significant investment into organizational development.

Second, there are several principles that FCPL needs to focus on:

- Work as one library, not a collection of independent branches

- Integrate traditional and evolving service models, as discussed in section 6.2

- Become a learning organization with a forward looking culture

- Change its mindset and embrace change

- Be quick and responsive to trends and technology

- Form partnerships, foster engagement, and use community experts

- Experiment, prototype, learn how to take risks, and learn from failure -- reach and strive for success

- Foster an organizational culture that values inclusivity and collaboration

- Create a strong customer service culture

- Utilize "lean" principles to adapt work flows and work processes that prioritize customer service, and invest in technologies to shift staff emphasis from the back room to the front of the building (lean management is an approach to running an organization that supports the concept of continuous improvement, a long-term approach to work that systematically seeks to achieve small, incremental changes in processes in order to improve efficiency and quality)

      More information:
      http://searchcio.techtarget.com/definition/lean-management

- Staff should build on their individual strengths by employing Gallup's "StrengthsFinder" program with a commitment to implementation

- Provide staff training in communication skills

7.2   Library Board of Trustees

7.2.1   Background

The Fairfax County Public Library Board of Trustees is responsible for library policies and for making budget recommendations to the Board of Supervisors. The 12-member, volunteer Board is composed of one member-at-large, approved by the Chairman of the Board of Trustees; and nine members representing each county district, appointed by each member of the Fairfax County Board of Supervisors; one member appointed by the City of Fairfax Council; and one member nominated by the Fairfax County School Board.

More information:

http://www.fairfaxcounty.gov/library/aboutthelibrary/trustees.htm

7.2.2 Discussion

Some things stand out as concerns about the Library Board.

First, it is very disappointing that only 8 trustees of the 12 (67%) Library Trustees took the online survey. This is not a good sign and particularly worrisome given that this community engagement project is under the direction of the Library Board.

Second, retired FCPL librarians have been appointed to the Library Board.

Third, the Library Board is by definition in a conflicted position. Because it recommends FCPL's budget to the Board of Supervisors, it necessarily becomes involved in operational issues. Operational issues are not the domain of a library board. That domain belongs to the Library Director.

Fourth, there is significant difference between Library Board and library staff perceptions on key issues. Trustees rank all but one statement higher than library staff. See Table 1: Question 8 Responses from the Online Survey Library Trustees and Staff. Trustees and staff were asked to rate their level of agreement with statements about the Library Board. Overall response percentages are from all 281 respondents. Staff percentages are 273 staff respondents and Trustee percentages are from 8 individual Trustee responses. Ranked order of statements with which all respondents **agree**:

Table 1: Question 8 Responses from the Online Survey Library Trustees and Staff

	Agree	Disagree	Don't Know
The Board understands and advances the Library's mission.	62.7%	17.1%	20.3%
Staff only	62.2%	17.3%	20.5%
Trustees only	75.0%	12.5%	12.5%
The Board supports senior management.	53.7%	13.9%	32.4%
Staff only	53.1%	14.0%	33.0%
Trustees only	75.0%	12.5%	12.5%
The Board makes thoughtful, strategic decisions.	52.6%	30.6%	16.7%
Staff only	52.8%	30.4%	16.9%
Trustees only	50.0%	37.5%	12.5%
The Board advocates effectively in the Library's best interest.	47.7%	35.6%	16.7%
Staff only	47.2%	35.9%	16.8%
Trustees only	62.5%	25.0%	12.5%
The Board works effectively with the County.	46.3%	22.1%	31.7%
Staff only	45.4%	22.4%	32.2%
Trustees only	75.0%	12.5%	12.5%
The Board seeks collaborations and partnerships that benefit the Library.	38.4%	27.8%	33.8%
Staff only	38.1%	27.5%	34.4%
Trustees only	50.0%	37.5%	12.5%
The Board exhibits foresight.	36.7%	42.7%	20.6%
Staff only	36.3%	42.9%	20.9%
Trustees only	50.0%	37.5%	12.5%

7.2.3 Recommendations

We offer the following recommendations.

Library Trustees and staff need to work closely together through new processes of open dialog to close the perception gap around key issues highlighted in the table above.

The Library Board needs to focus on strategy and policy, not operations. Delving into operational issues compromises the Library Board's integrity, is a no-win situation, and

distracts from the important work of the Library Board to measure fidelity between strategy and service implementation.

At the center of these issues is the Library Board's budget responsibility. The Library Board's has a valued history of independently preparing and overseeing FCPL's budget. However, we remain concerned about the Library Board's ability to protect the budget in a competitive funding environment, and to effectively lead a united constituency to advocate for funding before the Board of Supervisor's. Addressing these issues in depth is beyond the scope of this community engagement project.

We are very concerned that retired FCPL librarians were appointed to the Library Board. This is a conflict of interest. The Library Board must balance local and county priorities and should be a model of good governance. The officials who appoint Library Board members must avoid such conflicts of interest in future appointments and refer all library issues to the Library Board.

In light of these recommendations, and given the need for them to be comprehensively addressed, we recommend that an independent study of Library Board governance be immediately undertaken.

7.3   Friends of the Fairfax County Public Library

7.3.1   Background

FCPL branches are aided by their Friends groups. These independent nonprofit organizations support, assist, and promote library activities for the local community including fundraising to supplement the library's operating budget.

Friends groups are organized exclusively for educational purposes under section 501(c)(3) of the Internal Revenue Code.

> More information: https://www.fairfaxcounty.gov/library/friends/

FCPL has established ground rules with detailed policies and procedures for all Friends groups. These detailed policies and procedures are codified in the "Friends of the Library Handbook:"

> More information: https://www.fairfaxcounty.gov/library/friends/friendshandbook/

7.3.2   Discussion

The Friends groups play an important, vital, and valued role. Their hard work, financial contributions, civic leadership, and care that members express throughout each year contributes to the civic quality of life throughout Fairfax County.

Some Friends groups and/or individuals who are members of Friends groups have evolved from the narrow definition of Friend's group activities (e.g., supporting, assisting, and promoting library activities for the local community) to a focus on library advocacy that

includes a political dimension. Friends groups and/or individuals "wearing two hats" are causing confusion about the nature and role of Friends groups. This behavior tarnishes other Friends groups.

It should be confirmed that Friends policies and procedures are in current standing with respect to IRS regulations for tax-exempt organizations (i.e., correct filing of Form 990, 990-EZ, 990-PF, 990-N, etc.).

Guidestar is a nonprofit organization that gathers and disseminates information about IRS-registered nonprofit organizations. Guidestar presents available information about each nonprofit's mission, legitimacy, impact, reputation, finances, programs, transparency, and governance, among other information. The Guidestar database contains millions of pages of publicly available 990 forms on 1.9 million nonprofit organizations.

Based upon information in Guidestar, a summary of FCPL Friends groups has been prepared. See next page, Table 2: FCPL Friends of the Library Assets, Income, and Status on Guidestar.

7.3.3   Recommendations

We offer the following recommendations.

First, FCPL and Friends groups need to raise the level of corporate disclosure and transparency starting with information presented on or linked to the library's website. At a minimum, links should be provided to individual Friends information on Guidestar. Better still, information about individual Friends groups should be presented on the Library's website including annual reports, financial statements, Form 990s, and articles of incorporation.

Second, all Friends groups should be integral participants in the strategic planning process. This should include at least one individual meeting with each Friends group. Each Friends group should also be invited to participate in other strategic planning workshops, work sessions, and presentations.

Third, as mentioned above the move toward vocal advocacy by some Friends has blurred the line with the right to give input and participate in public processes related to library policies and procedures. Friends groups and individuals who engage in advocacy should strongly consider how their actions might affect the perception of all Friends groups and the library in the overall community. Toward this end, we suggest that the Library Board undertake an independent study related to the ethics of advocacy.

Fourth, as noted in the May 2015 report of the Office of Financial and Program Audit for the Fairfax County Public Library Departmental Gift Fund, implement formal procedures to address on-going book sales funds sharing.

> The audit report: http://www.fairfaxcounty.gov/boardauditor/oldreports.htm

Table 2: FCPL Friends of the Library Assets, Income, and Status on Guidestar

	Assets (1)	Income (1)	Identified on Guidestar	990 on Guidestar
Friends of Access Services (2)	N/A	N/A	N/A	N/A
Friends of the Burke Centre Library	$0	$0	Yes	No
Friends of the Centreville Regional Library	$0	$0	Yes	No
Friends of the Chantilly Regional Library	$145,938	$57,454	Yes	Yes
Friends of the City of Fairfax Regional Library (3)	$0	$0	Yes	Yes
Friends of the Dolley Madison Library	$0	$0	Yes	No
Friends of the George Mason Regional Library	$687,012	$186,929	Yes	Yes
Friends of the Great Falls Library	$0	$0	Yes	Yes
Friends of the Herndon Fortnightly Library	$0	$0	Yes	No
Friends of the John Marshall Library	$0	$0	Yes	No
Friends of the Kings Park Library	$0	$0	Yes	Yes
Friends of the Kingstowne Library	$0	$0	Yes	No
Friends of the Lorton Library	N/A	N/A	No	N/A
Friends of the Martha Washington Library	$0	$0	Yes	No
Friends of the Oakton Library	$0	$0	Yes	Yes
Friends of the Patrick Henry Library	$0	$0	Yes	Yes
Friends of the Pohick Regional Library	$187,620	$66,827	Yes	Yes
Friends of the Reston Regional Library	$720,266	$160,761	Yes	Yes
Friends of the Richard Byrd Library	$0	$0	Yes	No
Friends of the Sherwood Regional Library	$0	$0	Yes	Yes
Friends of the Thomas Jefferson Library	$0	$0	Yes	No
Friends of the Tysons-Pimmit Regional Library	$0	$0	Yes	Yes
Friends of the Virginia Room	$0	$0	Yes	Yes
Friends of the Woodrow Wilson Library	$0	$0	Yes	No
Music Friends of the Fairfax County Public Library	$0	$0	Yes	Yes

(1) Most recent filing as defined in Guidestar

(2) This group does no fundraising or book sales

(3) Registered on Guidestar at "Friends of the City of Fairfax Library"

7.4   Fairfax Library Foundation

7.4.1   Background

The Fairfax Library Foundation is a 501 (c)(3) nonprofit charitable and educational organization committed to providing supplementary support to the library. The Foundation, while reinforcing the need for continued and increased public support for the library, serves as a catalyst for attracting private funding from individuals, businesses, organizations, and foundations to enhance library services for the community.

More information: http://fairfaxlibraryfoundation.org/

7.4.2   Discussion

Public libraries and their foundations have multi-dimensional relationships -- while serving the same public, they work independently yet together, have uniquely different business objectives, are accountable to separate boards, and function under separate legal frameworks. While the library and the Foundation need to operate separately, close planning, coordination, and strong communications at the executive level will continue to benefit both organizations.

The Foundation reports on Guidestar and reports on its website its annual report, financial statements, Form 990, and articles of incorporation.

Recently, some of the Friends groups have increased their own financial support that might otherwise have gone to the Foundation. That is, some monies that might have previously been offered to the Foundation and which would have accrued systemwide benefits have instead gone to local Friends groups and instead benefit only local branches.

7.4.3   Recommendations

We offer the following recommendations.

There should be regularly scheduled (i.e., bi-weekly) informal conversations between the Foundation Executive Director and Library Director; and, there should also be regularly scheduled (i.e., quarterly) joint planning sessions between the Foundation and the library leadership teams. Both executives should continue efforts to communicate benefits of working together to their respective Boards.

While being mindful of the necessary separations, the Foundation should be an active participant in FCPL's strategic planning process, and eventually implementation of initiatives.

- Participation of the Foundation's Executive Director on FCPL's planning team steering committee

- Review and consideration of the Foundation's strategic plan, initiatives, and objectives as part of the information gathering process

- An implementation component in the strategic plan related to the Foundation

The Foundation should remain the primary systemwide fundraising vehicle for FCPL as a whole. To protect this role, Friends group bylaws should be revised to limit fundraising or to engage in revenue sharing above certain limits. Because it's beyond the scope of this community engagement process to make specific recommendations about these limits, we recommend further study of this issue.

8.0 Appendices

Appendix 1: Telephone Survey and Online Survey of Community Residents

Under separate cover

Appendix 2: Online Survey of Library Trustees and Staff

Under separate cover

Appendix 3: Public Forums Work Book

Under separate cover

Appendix 4: Market Segmentation Background Information and Customer and Usage Analysis

Under separate cover

Errata

September 9, 2016: page 4. Changed "309" cell phones to "300" cell phones.

The Library Board of Trustees of the Fairfax County Public Library
Community Engagement Findings and Recommendations

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